IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re application of: Steven R. Jenkins	§ §	
	§	Attorney Docket No. 8000.53.02
Serial No.: 09/419,327	§ §	Customer No. 27683
Filed: October 15, 1999	§ §	Group Art Unit: 2177
For: A WEB-ENABLED TRANSACTION AND MATTER MANAGEMENT SYSTEM	§ §	Examiner: Dodds, Harold E.

DECLARATION UNDER RULE 37 C.F.R. § 1.132

1. I am the applicant of the above-identified patent application (hereinafter "Application") and am the inventor of the subject matter therein described and claimed.

2. All acts described in this Declaration took place in the United States of America.

3. Prior to February 3, 1998, I first thought of the invention claimed in the above-identified patent application.

4. I participated in multiple developmental meetings for my invention prior to February 3, 1998, including meetings with James Melson, whom I engaged as a consultant in connection with the development of the subject matter of the Application. The meetings prior to February 3, 1998, included (but were not limited to) the concepts embodied in the design notes (attached as Exhibit A) that I subsequently drafted. These concepts are the subject matter of the Application. For example, the concepts discussed during the meetings and embodied in the design notes correlate to claim 15 as follows:

Subject matter of claim 15	Subject matter disclosed prior to February 3, 1998, as evidenced by subsequent design notes
A software program for implementing a website by which documents can be shared between a service provider and a client, the software program comprising:	
instructions for accessing a repository, the repository for storing a plurality of documents;	Page 35 illustrates a plurality of documents. Page 38 illustrates a document library.
a first graphical interface by which a first user associated with the service provider	Graphical interfaces are represented throughout the design notes.
can log into the network application,	Logging into a network is inherent given the password and access restriction elements (see, for example,

	pages 41-44).
can add one or more documents to the repository,	Page 35 illustrates a plurality of documents in a graphical interface. These documents may be added by using, for example, the "Document Management" feature illustrated on page 7.
and can assign a category, an authorization, and a matter for each document,	Page 39 illustrates a "New Project Wizard", pages 42-44 illustrate a "New Client Wizard", and page 35 illustrates a plurality of documents. These illustrate embodiments of a category, an authorization, and a matter, respectively.
wherein the matter conceptually links a plurality of related documents and information associated with the matter is applicable to each of the plurality of documents;	Page 35 illustrates such "linked" documents.
instructions for identifying one or more clients, each client comprising one or more users having a level of authorization with respect to matters of the client;	Pages 42-44 illustrate a "New Client Wizard" where users are associated with levels of authorization with respect to client matters.
an email interface linked to the first graphical interface, the email interface including a list of potential email recipients selected according to at least one client, the category and the matter;	Page 23 illustrates an email interface that satisfies these elements.
a second graphical interface by which a second user associated with a client can log into the network application and can access one or more of the documents in the repository, based on the category, authorization, and matter for the one or more documents; and instructions for allowing the second user to view, add, or modify any one of the documents in the repository according to the authorization of the second user with respect to a particular matter.	These elements are satisfied as described on pages 7, 23, 35, 38, 39, 41-44.

5. I participated in additional meetings for my invention on at least the following dates in 1998:

February 5, 17, 27;

March 5, 17;

April 2, 18, 20, 28;

May 14, 27;

June 9, 18, 23;

July 14, 16, 21, 28;

August 4, 11, 20, 31; and

September 11, 21, 23, 24.

Each of these meetings was directed to the continued development of my invention. Between meetings, I regularly participated in telephone calls involving the continued development of my invention. This process began prior to February 3, 1998, and continued up to and past October 2, 1998, at which time I and my patent attorneys began preparation of the above-identified patent application for the invention claimed.

6. On October 16, 1998, provisional patent application 60/104,527, on which the above-identified patent application claims priority, was filed with the U.S. Patent Office.

7. At no time between February 3, 1998, and October 16, 1998, were my activities regarding disclosure of my invention in the above-identified provisional patent application ever suspended. I diligently moved towards disclosure of my invention by filing the above-identified provisional patent application.

8. Based on the foregoing facts, I conceived my invention prior to February 3, 1998, and was diligent in preparing the provisional patent application for filing on October 16, 1998.

I acknowledge that willful false statements are punishable by fine or imprisonment, or both, under 18 U.S.C. § 1001, and may jeopardize the validity of this application or any patent issuing from it. I declare under penalty of perjury under the laws of the United States that all statements made of my own knowledge are true and that all statements made on information and belief are believed to be true.

Steven R. Jenkins

12/9/02

Date

r-36076.1

Exhibit A

ns

HIGHLIGHTING KEYS

set; non-variable

variable; determined by choices in New Client Wizard

variable; determined by choices in New Project Wizard

Data Input

Reports only; data previously input

Column Key

CLIENT CONNECT
Specific Keys

- **Storefront**
  - Links to specific areas *direct paths*
  - Return to Storefront
  - Division / All Projects / Project Approach
  - Navigation Tools

- **Transaction Management**
  - Status
    - Method for Most Current? *last edit time & date stamp by person?*
      Multiple Party Input
  - Issues
    - Template List of Categories of Issues / Client
    - "Hot" Issues *Key*
    - Responsibilities
    - Discuss
    - Collapsible for Concurrent Text
  - Critical Dates
    - Template List of Critical Dates / Client
  - Checklists
    - Specific Checklists / Templates for Client
  - Action
    - Report Accessible by Each Person
  - Working Group
    - Input Form
    - Auto Assign to "WG #s"

- **WG #s**
  - Horizontal -- 1 line -- Format

- **E-mail**
  - Easy Access
  - Auto setup -- From
    Re -- Client Connect [category]
    Date
  - To; CC; BC -- Pop-up Address Lists
    Internal Distribution
    Distribution Lists
    set up default distribution per screen
  - "Copy" Issue ?

- **Transaction Management Reports**
  - Each "Standard" Report Customizable on Spot *pop-up variable*
  - Data Input in Reports ✓
  - Context Must Show ✓
  - All Projects or Selected (1 or more) Projects ✓

• Status Report	- Method for Most Current ✓ multip. people time (date stamp)
• "Hot" Issues Report	- Customizable for All or Outstanding Only
• Issues Report	- Customizable for All or Outstanding Only
• Critical Dates Report	- Customizable for Period
• Checklist Report	- Customizable for All or Outstanding Only
• ~~Active~~ Action Report	- Customizable for All or Outstanding Only - Customizable for Each ~~Active~~ Action Party
• Responsibility Report	- Customizable for All or Outstanding Only - Customizable for Responsible Party
• Discussion Report	- Customizable for All or Outstanding Only - Customizable for Discussion Party
• Custom Thelan review + give idea	- Multiple Options
• Projects Report	- Columns Per Report - All Reports automatically for that project
• Document Management	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item
• Counsel Information	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item
• Client Information	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item
• Library	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item

CLIENT CONNECT
General Keys

- 2-Way Input / Password Limited yes
- Input in Both Transaction Management and Transaction Management Reports JM will check
- Input and/or Reports for Attorneys on Multiple Clients "Files" button — yes
- Division / All Projects / Projects Approach JM will check - think OK
- Storefront / Return to Storefront yes
- Navigation Tools: on all pages — Return to Storefront; Working Group #s; E-mail; Files (for Attorneys Only) — all OK
- Data Input: Method HTML - OK
- Wizards: New Client -- for setup of new client; New Project -- for setup of new project; Data Input -- for data input non issue - HTML direct input; Password -- for password administration — "intelligent"
- Context: e.g., "Project, City, State" throughout; Issues Category; Specific Transaction Management--e.g., Critical Dates/Action/etc.
- Reports: Variations of ~~Customizable in~~ Each "Standard" Report
- Archive: When Complete Project
- Data or File Limits No issues
- *Data Input: In Views for Easy Access HTML - OK
- Password: Limitations / Keys later major discussion

COLLABRANET

General Keys

- Input and/or Reports on Multiple Clients

CLIENT CONNECT – CLIENT STOREFRONT

JM - default to division or last one?

To permit multi-division access eg Arch Dispositions Acquisitions Litigation

CLIENT CONNECT - CLIENT

DIVISION [ ] ALL PROJECTS ( ) PROJECT [ ]

TRANSACTION MANAGEMENT

- STATUS
- ISSUES
- CRITICAL DATES
- CHECKLISTS
- ACTION
- WORKING GROUP

DOCUMENT MANAGEMENT

COUNSEL INFORMATION

CLIENT INFORMATION

LIBRARY

TM REPORTS

- STATUS Report
- ~~Hot Issues Report~~
- Issues Report
- CRITICAL DATES REPORT
- CHECKLIST REPORT
- ACTION REPORT
- RESPONSIBILITY REPORT
- DISCUSSION REPORT
- PROJECT REPORT
- CUSTOM REPORTS

DATA INPUT

[ ] STOREFRONT [ ] WORKING GROUP #4 [ ] E-MAIL FILES [ ]

NOTE: NAVIGATION TOOLS could be at SIDE

Storefront Button

File Button

- to access other files eg Archive PRT TW HB SRO
- opens storefront page for applicable file
- Counsel Only

INTEGRATION OF DATABASES

COLLABRANET STOREFRONT

CollabraNet - Haynes and Boone, L.L.P.	Steven R. Jenkins
☐ STOREFRONT	☐ E-MAIL

By Attorney | All Action Items by Client/Project + Action Button

. Better if goes to calendar tickler

Firm Intranet / Links to Client Canvas

PRACTICE MANAGEMENT
· Calendar
· Phonebook
· Time Entry
C/M List
· Docs Open
· To Do

Firm
· HB Apps
Phonebooks — Firm
Clients
BOD
Library — (CDR)
Docket Library

TRANSITION / MATTER Mgt
· C/M IFS
· TM Standalone
· Client Contact

Key = relate to individual calendar

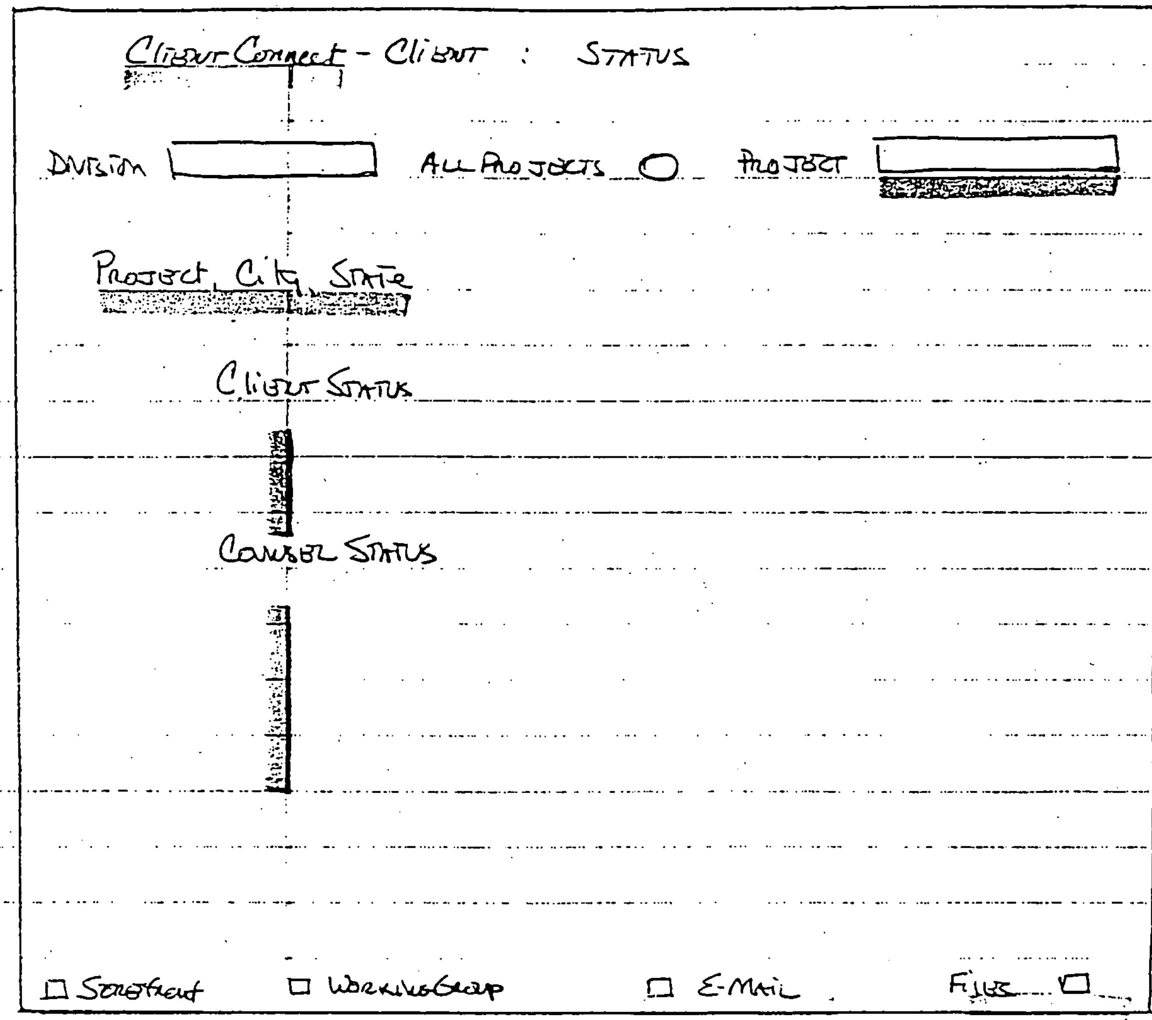
Commission

Client Mgt
· C/M info
· new client / matter w/f
· AR / Billing — Elite
· Compuflow

Dept
Doc Library
Research

Client Dev
· Comm
· Dept
· Firm
· Presentations
· BD Dlvrs

Communications
- E Mail
· Reuters News
· Client Comm



RP- method f
determining late

Also "Last
Edit Date"

ALL Projects

Status

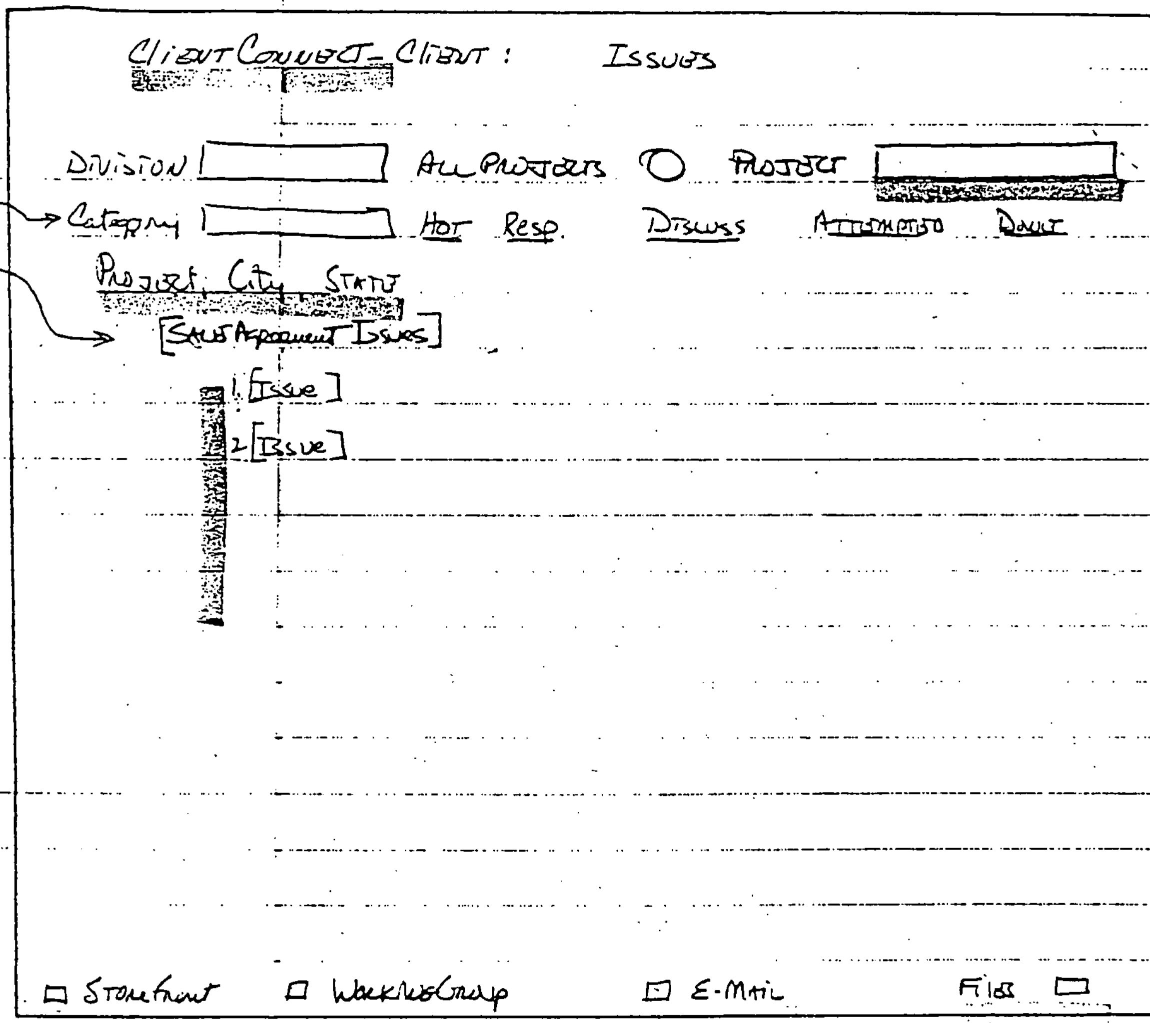
	Done
Status	
o 52 & 56 Roland St., Charlestown, MA	
A. o Weekly Status Report~	
1. o **Week of 1/5/98:** Inspection Period extended until 1/15/98; Closing scheduled for 2/6/98; Buyer still assessing certain environmental matters.	

Project →
Weekly Report →
~ for auto assign rules
for filter ↓

Purpose: to view weekly status reports by Project; uses filter to "hide" prior reports; for clients' convenience, uses filter to limit view to only most current

Expand to include Client status

Categories = ALL or Specified variables



Set - Create List of Issues Categories

ALL ADJ[illegible]

for filter

Issues

~ for autoassign Rule

	Resp.	Discuss	Attempted	Done	Date
Issues					
Proj → ❑ 32 & 56 Roland St., Charlestown, MA					
A. ❑ Issues Checklist(~)					
1. ❑ **Input/ Initial Drafting Issues (List):**					
2. ❑ **Local Counsel Issues (List):**					
3. ❑ **Sale Agreement Issues (List):**					
a. ❑ Section 3.2(a) & 3.9(a) – Brady wants rep from Seller that Seller hasn't received written notices from the govt. as to non-compliance with applicable laws, regulations, etc.					
b. ❑ Section 3.3(b) – Brady wants Purchaser's liability limited to "negligence in conducting inspections or tests" rather that simply any claims "arising out of Purchaser's inspections or tests"					
c. ❑ Section 3.6(a) – Brady wants to state that Purchaser will give Seller copies of reports, tests, etc. only if Purchaser does not close. He also wants Seller to pay for 1/2 of the cost thereof if Purchaser does not close.					
4. ❑ **Title/ Survey Issues (List):**					
5. ❑ **Inspection Period Issues (Purchaser Identified) (List):**					
6. ❑ **Closing Issues (List):**					

Bold = Template

Purpose. to input and view outstanding issues by Project / type of issues; for clients' convience, uses filter to limit view to only outstanding issues

Columns in this view and other views serve specific purposes:

- Resp.: person responsible for issue (Pop up – to assign responsibility)
- Discuss: identity of person to discuss issue with (POP UP - to assign to individual)
  Note: assignments are shown in "Discussion View" sorted by Project
- Attempted: "attempted" to discuss (✓ column)
- Done: date stamp (for hide done filter)

Suggested Improvement:

- create new view for "Hot Issues" to put limited number of genuinely key (ie. "deal buster" issues) in front of senior management

Template PROJEC[illegible]nd ALL PROJECTS

Hidden Column for "Master Calendar"

Critical Dates

	Resp.	Approved	Discuss	Date	Done	Check	Critical Dates
Critical Dates~							
52 & 56 Roland St., Charlestown, MA							
A. Sale Agreement Summary~							
1. Critical Dates Summary and Checklist~							
a. Roland St. - Effective Date **(Section 10.3): ________, 19__ (date on which the Title Company executes the Joinder of Title Company following the execution by both Purchaser and Seller)**							
b. Roland St. - Deposit of Initial Earnest Money **(Section 2.2(a)): ________, 19__ (within one business day after the Title Company has received a copy of the Agreement executed by both Seller and Purchaser); note: Purchaser also to deposit with Seller $100 Independent Consideration**							
c. Roland St. - Deposit of Additional Earnest Money **(Section 2.2(a)): ________, 19__ (within one business day after the expiration of the Purchaser's Inspection Period)**							
d. Roland St. - Availability of Due Diligence Documents **(if date applicable, Section __): ________, 19__ (__ days after Effective Date)**							
e. Roland St. - Title Commitment/ Title Documents **(Section 6.1): ________, 19__ (__ days after Effective Date)**							
f. Roland St. - Survey **(Section 4.1): ________, 19__ (__ days after the Effective Date); note: Agreement does not specify exact date for delivery**							

ClientConnect – Client: Critical Dates

Division [ ] All Projects ○ Project [ ]

Resp. Assigned Discuss Date Done

JM – need pop up for date selection

Project, City, State

1. [Date, Item]
2. [Date, Item]

Template

RP – for composite calendar – must insert Project Name on each item

☐ Storefront ☐ Working Group ☐ E-Mail Files ☐

Critical Dates

		Resp.	Approved	Discuss	Date	Done Check	Critical Dates
m.	☐ Roland St. - Special Dates:						
n.	☐ Last Edit Date: _/_/_(_)						

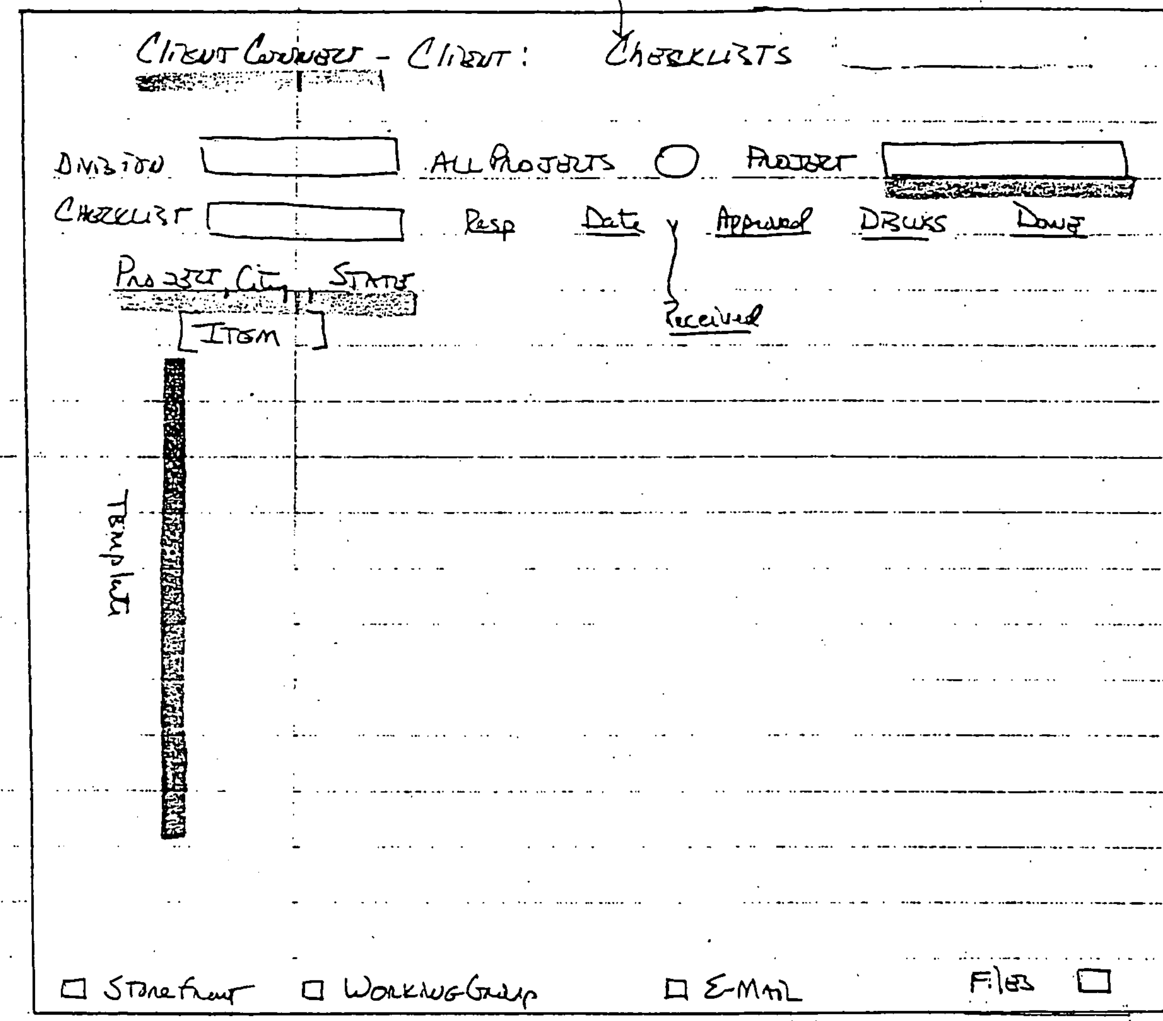
Purpose: to track Critical Dates by Project and date item

to create "Master" Calendar of Critical Dates for all Projects

P16

Note: Wizard Variable
eg "Closing Checklist"
or "Due Diligence Checklist"

SRT - Create alternate checklists



Template

PROJECT

Checkmark or date without filter

Due Diligence

	Resp.	Date	Approved	Discuss	Done	Check
☐ Due Diligence						
ZCT → ▫ 52 & 56 Roland St., Charlestown, MA						
A. ▫ Due Diligence Checklist~						
1. ▫ Seller's Deliveries:						
a. ▫ Title Information						
1. ▫ Survey						
2. ▫ Title Commitment						
3. ▫ Title Documents (Exceptions)						
b. ▫ Property Information						
1. ▫ Environmental Reports						
2. ▫ Assessments						
3. ▫ Ad Valorem and Personal Property Tax Bills						
4. ▫ Notices or Correspondence from Governmental Entities						
5. ▫ Rent Roll						
6. ▫ Monthly Operating Statements						
7. ▫ Certificate(s) of Occupancy						
8. ▫ Plans and Specifications						
9. ▫ Service Contracts						
10. ▫ Summary of Operating Expenditures						
11. ▫ Licenses						
12. ▫ Pending Litigation						
13. ▫ Leases (for non multi-family)						
14. ▫ Other Documents or Information						
c. ▫ Other Information						

PURPOSE: 2-way checklist for closing
No filter - Always view entire checklist

Template Project

Checkmark or date (without filts

Closing

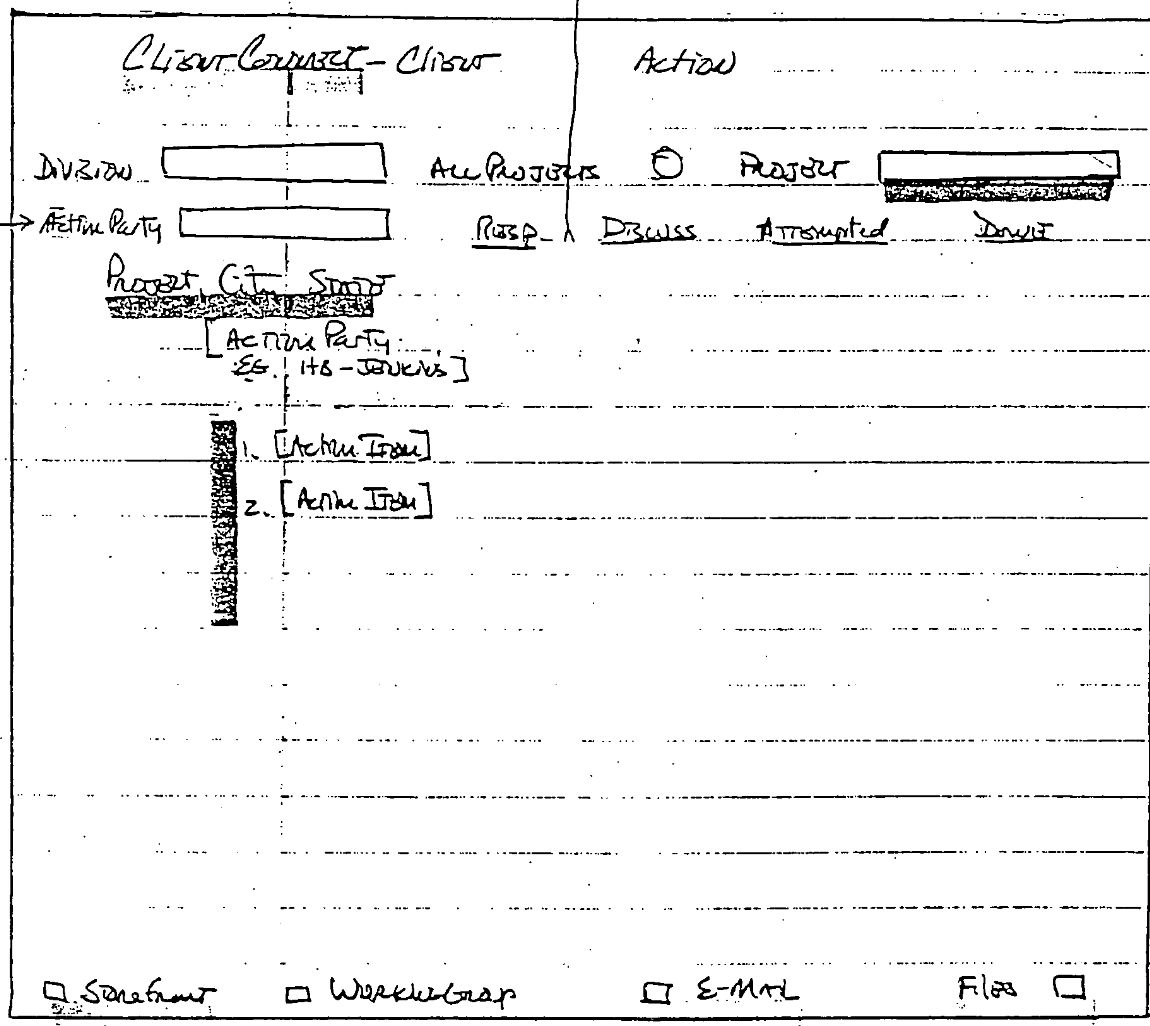
	Resp.	Date	Approved	Discuss	Done	Check
Closing						
→PROJECT 52 & 56 Roland St., Charlestown, MA						
A. Closing Checklist~						
1. Seller's Deliveries (Section 7.2 (a)):						
a. Deed						
b. Bill of Sale, Assignment and Assumption- Exhibit C						
c. Seller's FIRPTA Affidavit						
d. Owner's Title Policy						
e. Closing Statement						
f. Evidence of Authority						
g. Original Leases						
h. Assumed Contracts						
i. Other Documents Required by Sale Agreement or by the Title Company						
j. Tenant Estoppel Certificates						
k. Other Documents Identified During Due Diligence Process or by Agreement of Parties						
2. Purchaser's Deliveries (Section 7.2 (b)):						
a. Purchase Price, plus or minus prorations						
b. Bill of Sale, Assignment and Assumption- Exhibit C						
c. Closing Statement						
d. Evidence of Authority						
e. Other Documents Required by Sale Agreement, Seller or by the Title Company						
f. Other Documents Identified During Due Diligence Process or by Agreement of Parties						

PURPOSE: 2-way checklist for closing

No filter - Always view entire checklist

Date

Action Party =
All Client / Counsel
individuals



RP—
cross data
to CN?

Resp / Discuss

WORKING ~~Setup Duty~~ GROUP

Name | Company | Role | Resp. / Discuss | Mailing | Tel

SJT - Define Field

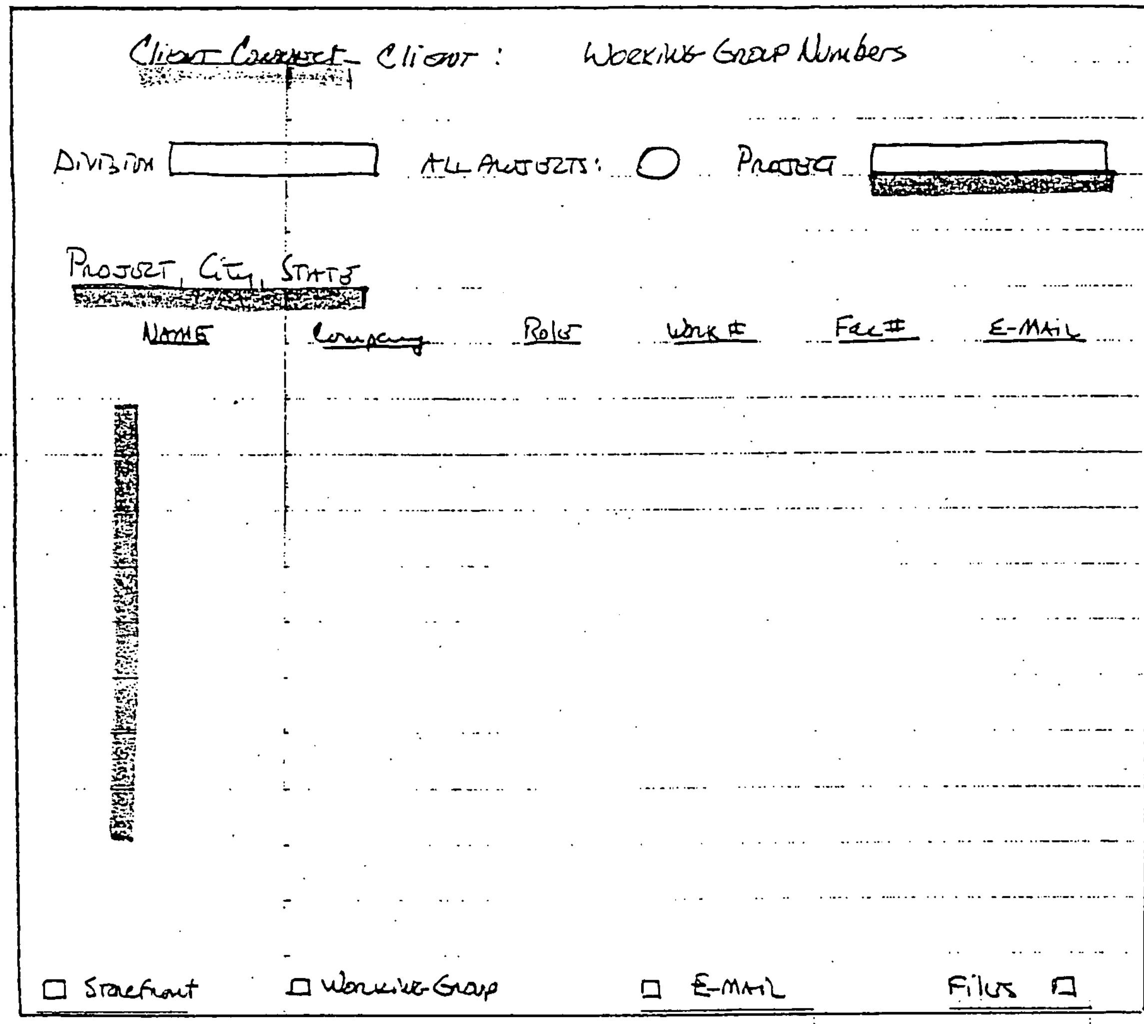
Counsel: SJT
H+B
901 Main St. Suite 3100
Dallas Tx 75202
~~Justin@ haynesboone~~
(o) 214-651-5283
(h)
(m)
(F)
(E)
WP System
WG #1

RP - input suggestions

WG #2
Project

Name	Company	Role	Telephone	Fax	E-Mail
Jenkins Steven R	H+B	Counsel			

NOTE: if "Working Group" is selected in
NEW CLIENT WIZARD, then
"Working Group #s" should be automatically generated
and "Working Group #" button should appear at
bottom of all screens



ClientConnect - Client   E-MAIL

RP – design capabilities

ADDRESS –
NAMES
INFORMATION GROUP
DISTRIBUTION GROUP

To: cc: bc:

From: [User]

Auto: USER

Date:

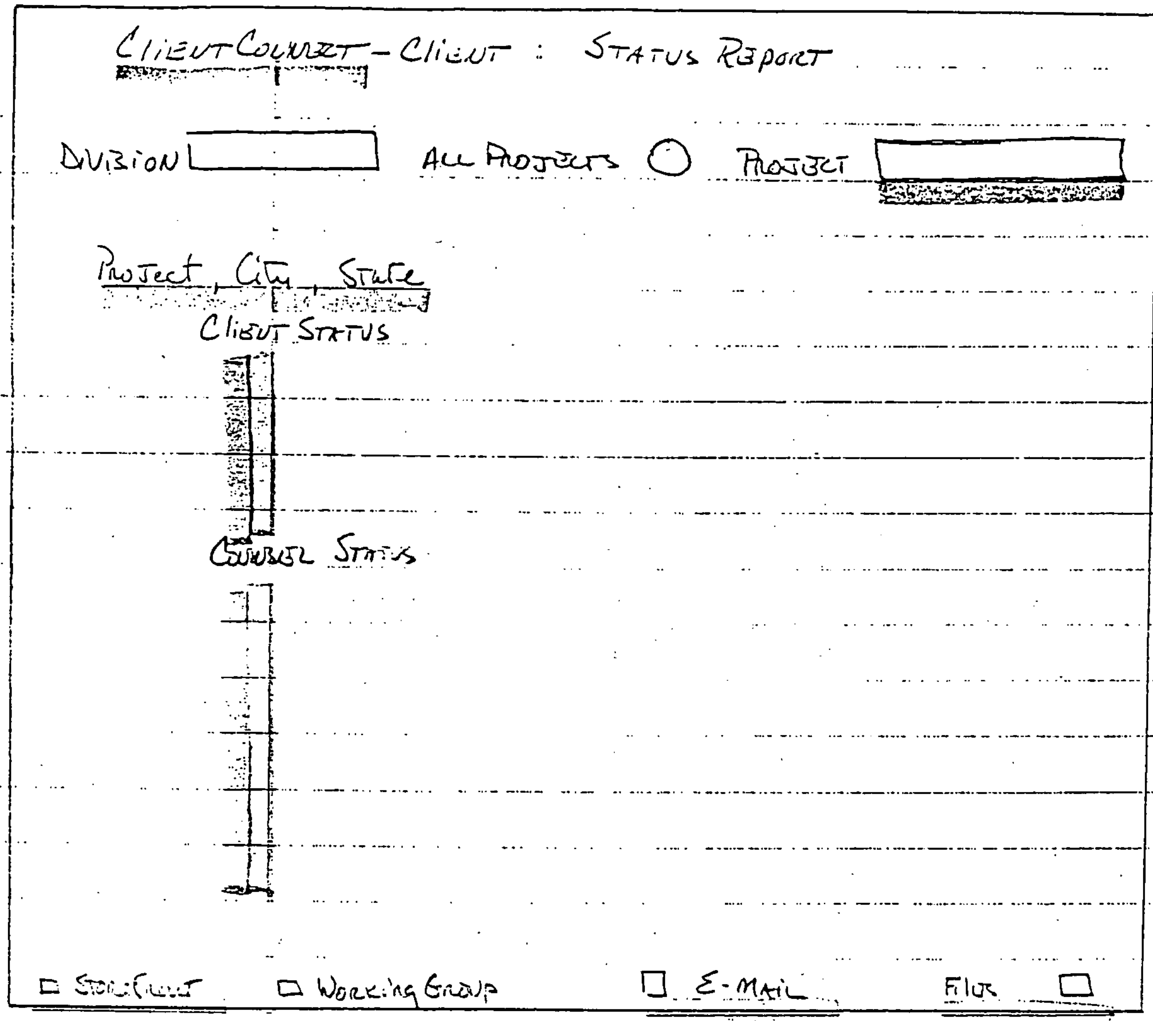
Auto: default
option: user specified

Re: ClientConnect: TRANSACTION MANAGEMENT – ISSUES
PROJECT, CITY, STATE

RP – Ability to "retain" E-Mails

PURPOSE:

Client/local response



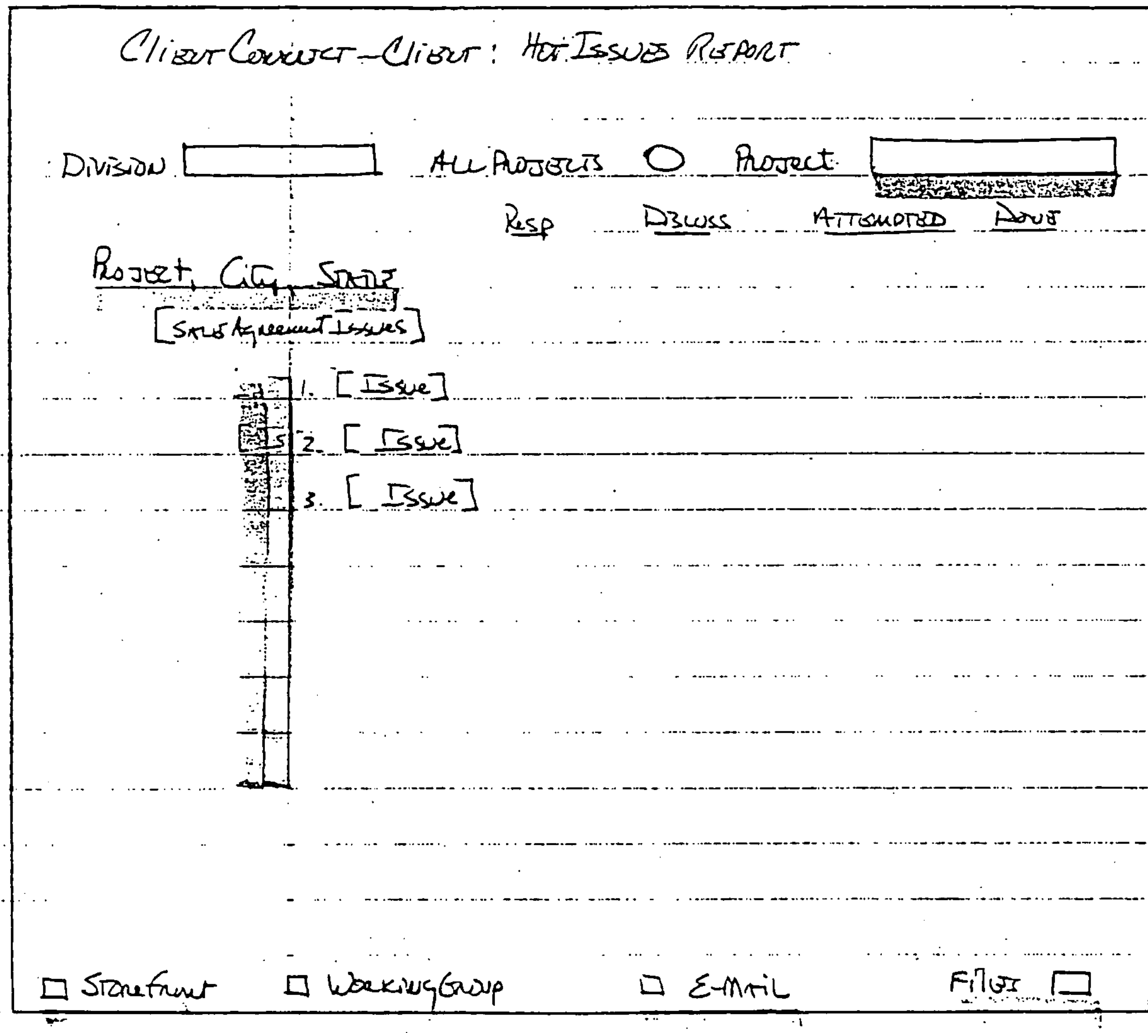
Purpose : quick, Thumbnail status report
from client and counsel
Show most recent - until changed

Discuss how determine "Most Recent" and "Last Edit Date"

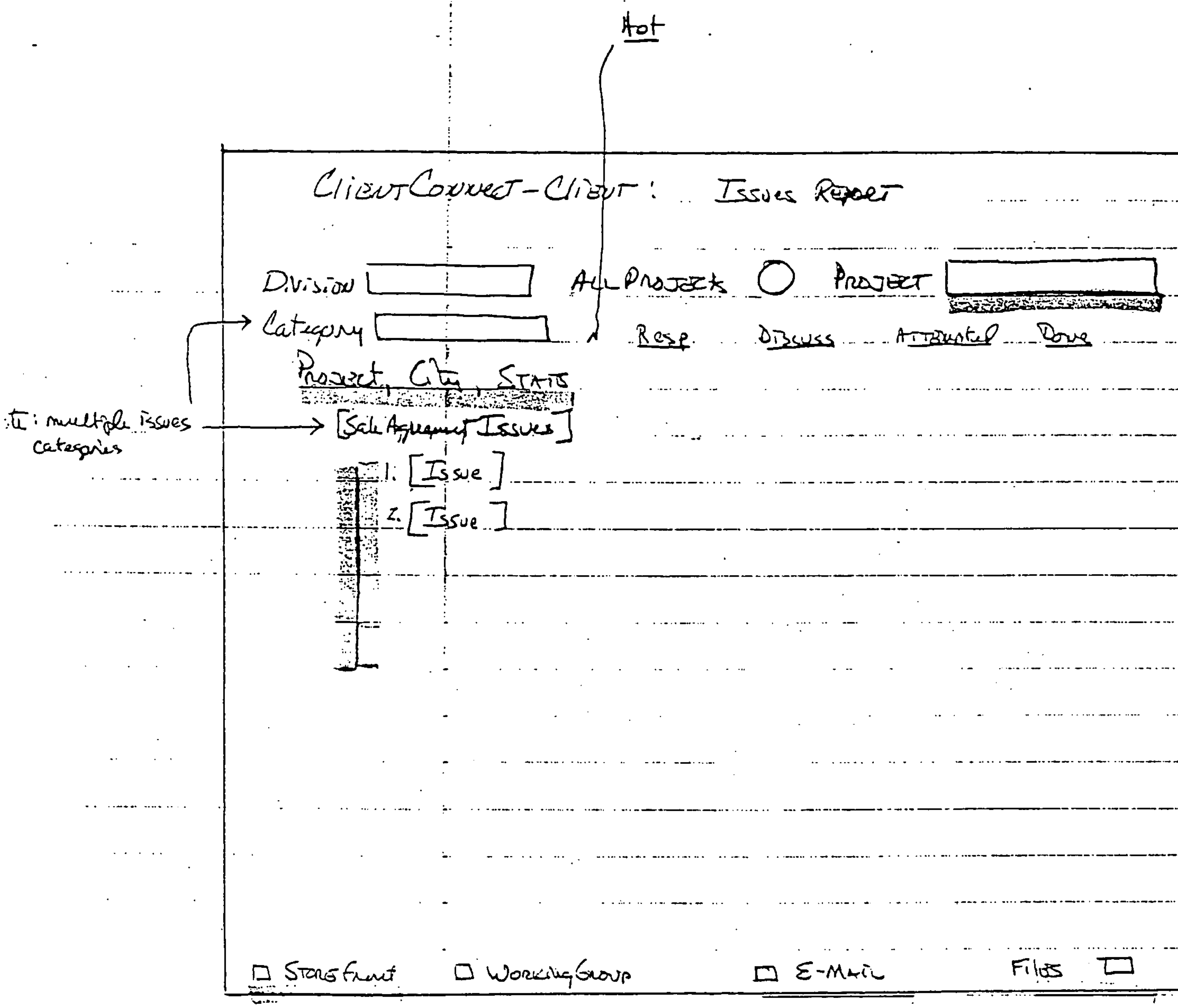
Input : Counsel/Staff - into TM status

Links : None

Relationship

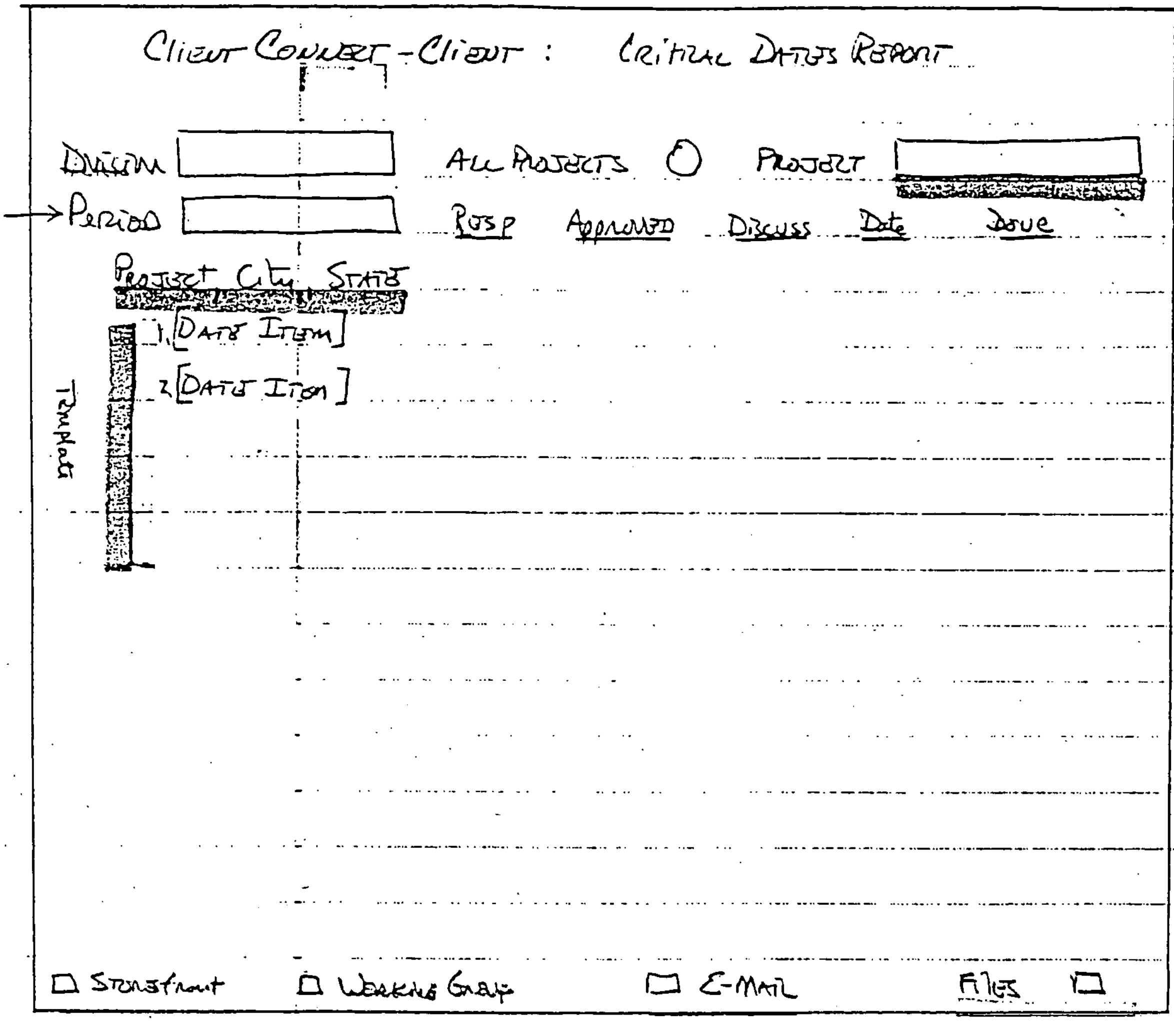


Purpose: Show all outstanding "Hot" Issues
sorted by Project / Area (eg Issues, Critical Dates)



Purpose: show all outstanding "Issues"
sorted by Issue Category

efault to
xt 15 days
dd options 30
45
60
90



Status "Done" column for input in the view

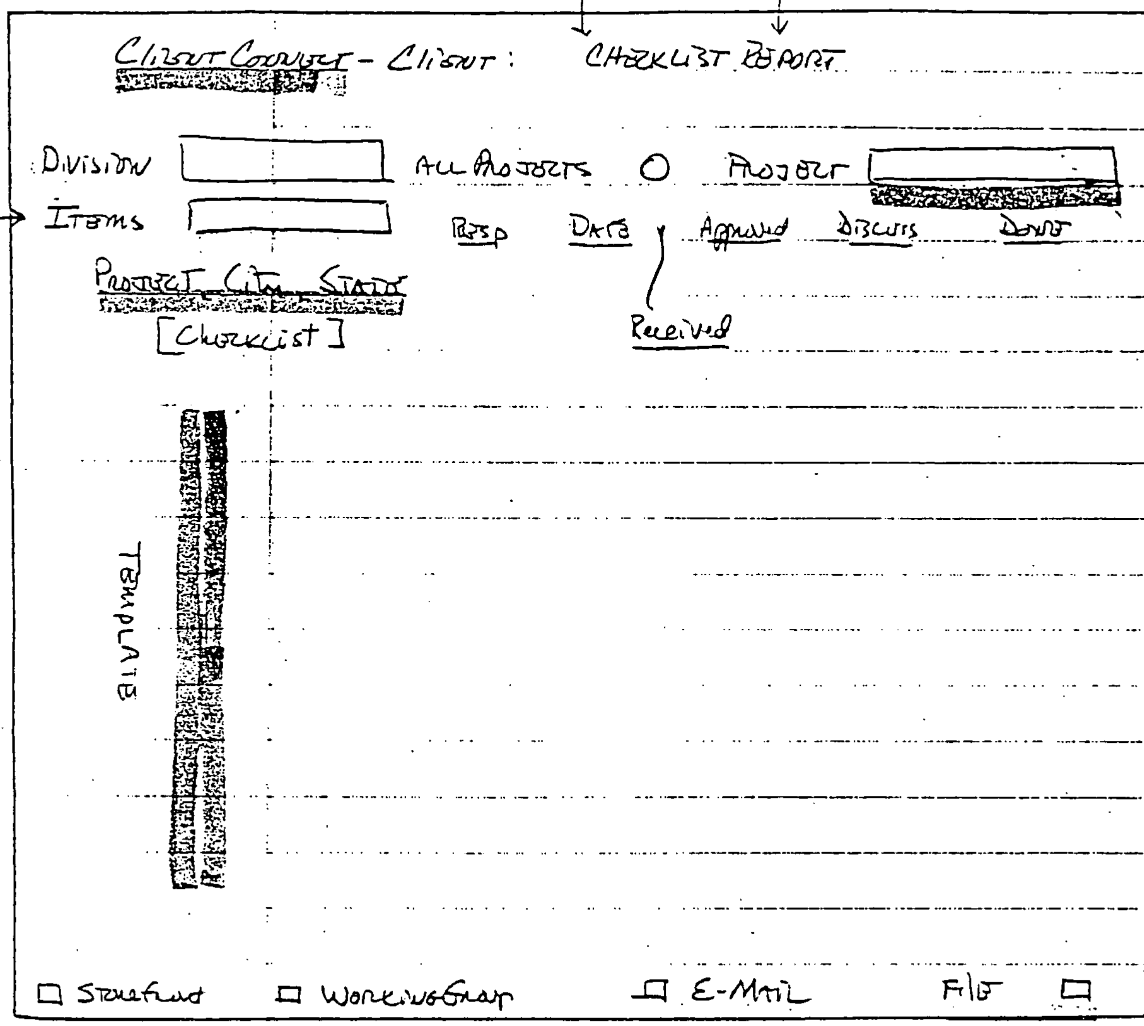
Purpose: show items per Critical Dates to be completed in next period — 15 days by default

NOTE: Wizard Variable
eg "Closing Checklist Report" or
"Due Diligence Checklist Report"

Note: Default to
OUTSTANDING
Custom for ALL

Separate Report for each checklist

Option =
ALL ITEMS
or Incomplete ITEMS



Purpose: to show OUTSTANDING checklist items by default

NOTE: Default to OUTSTANDING
Custom to ALL

ClientConnect - Client Action Report

Division [ ] All Projects ○ Project [ ]

Action Party [ ] Resp. Date Discuss Attempted Done

Project City State

[Action Party]

1.- [Action Item]

2. [Action Item]

☐ Storefront ☐ Working Group ☐ E-Mail File ☐

Purpose: to show outstanding Action Items by Action Party

NOTE: Default to Outstanding Responsibility Items

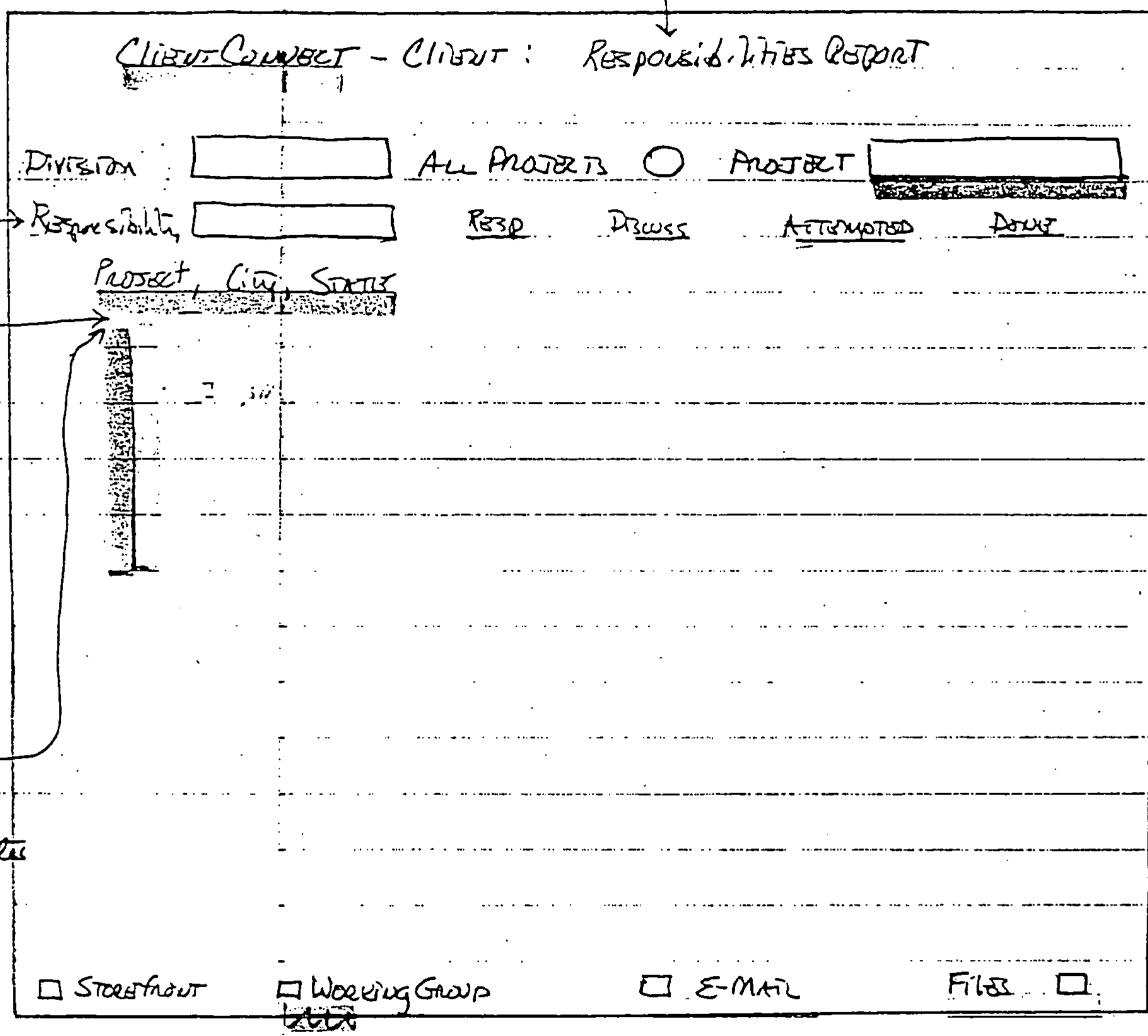
Custom for ALL ITEMS

Options: ALL or Individuals

IF "ALL" — then show each "Name" as content, then list Responsibility ITEMS

JM — can we set default to "user" based on password? or default to last specified?

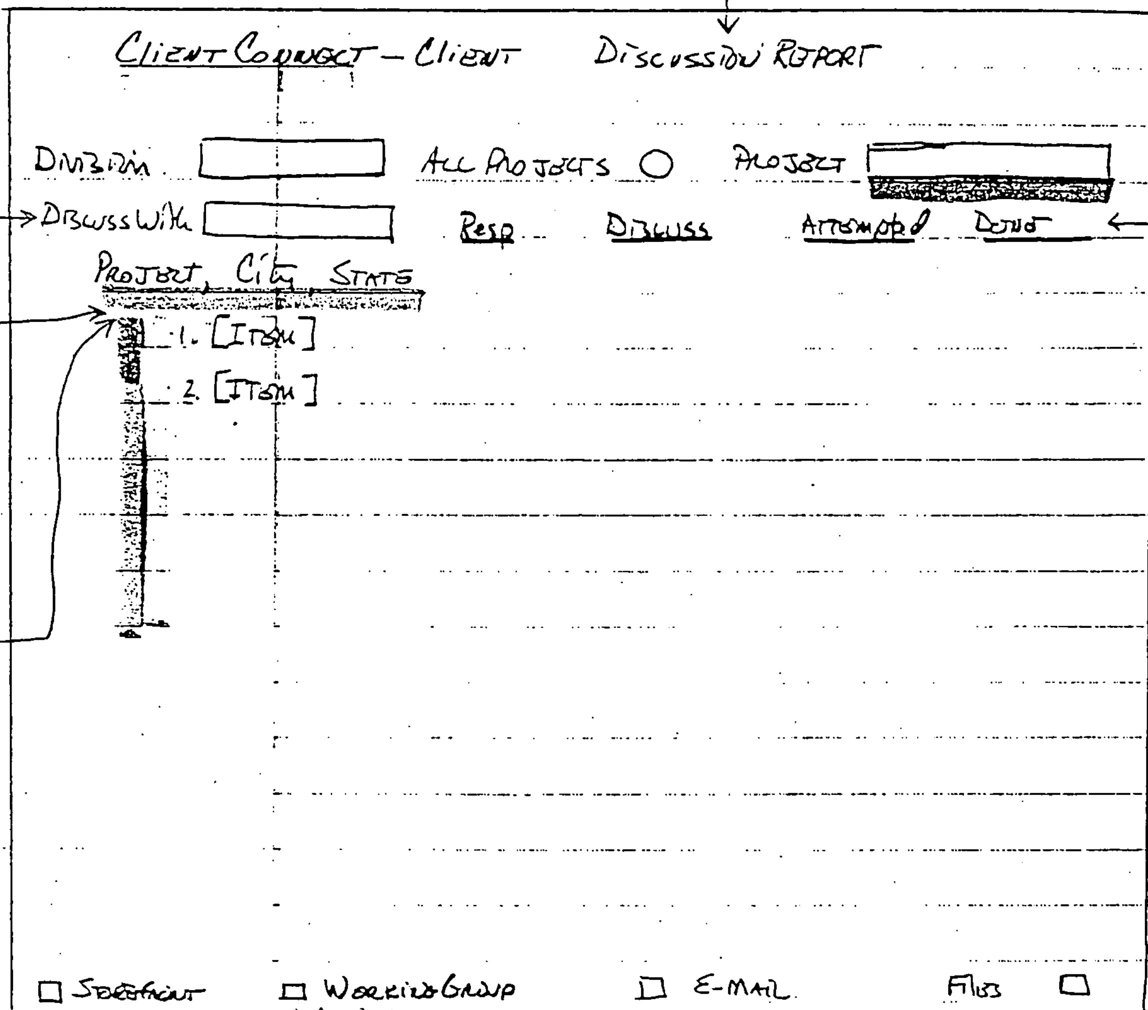
Context — eg Issues Critical Dates Checklist



Purpose : to show outstanding responsibility items by responsibility party

Note: default to OUTSTANDING DISCUSSION ITEMS

CUSTOM REPORT FOR ALL ITEMS



options: ALL INDIVIDUALS

If "ALL" – then show each "name" then Discussion items

JM – can we set default to "user" based on password?

Content – eg
Issues
Critical Dates
Checklist

Note: leave "Done" column for input in this view

Purpose: to show OUTSTANDING DISCUSSION ITEMS by Discussion Party

Discussion Report SAmple

	Resp.	Attempted	Discuss	Done
☐ A-Huff				
☐ A-Harris				
☐ A-Johnson				
☐ A-Barger				
▫ 52 & 56 Roland St., Charlestown, MA				
A. ▫ **Issues Checklist–**				
1. ▫ **Sale Agreement Issues (List):**				
a. ▫ Section 3.2(a) & 3.9(a) – Brady wants rep from Seller that Seller hasn't received written notices from the govt. as to non-compliance with applicable laws, regulations, etc.	▫ A-Huff		▫ A-Barger	
☐ HB-Jenkins				
☐ HB-Lowry				
☐ HB-Raines				
☐ HB-Hudnall				
☐ HB-Mellon				
☐ HB-Miller				
☐ HB-Wilkinson				
☐ Loc. Counsel				
☐ Purchaser				
☐ P's Counsel				
☐ Title Company				

Purpose: to view issues that relate to a specific person – viewed by Project Assigned by "Discuss" Column

Client Connect – Client Project Report

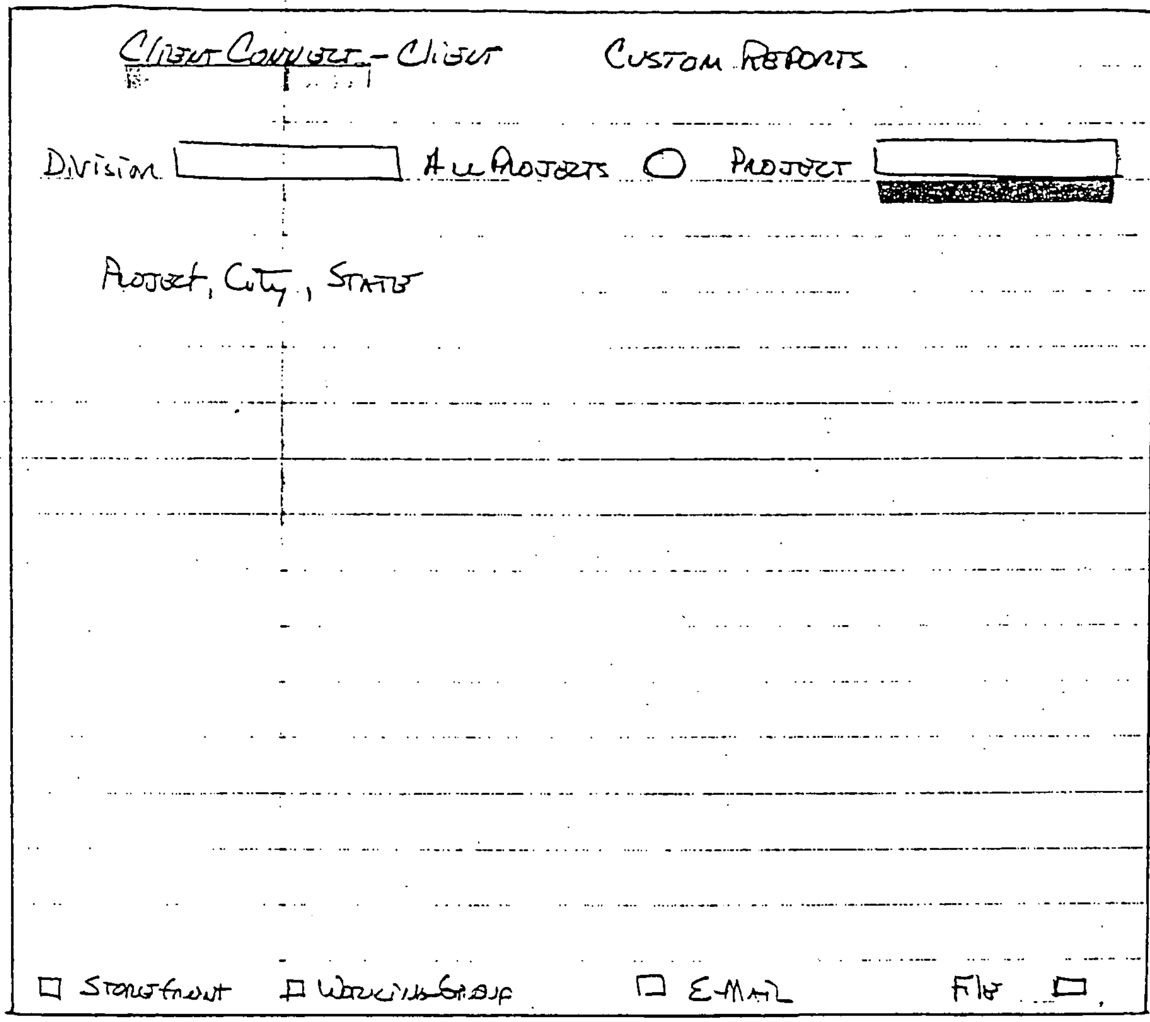
Division ☐ Project ☐

Show Columns by Report

All Reports

☐ Storefront ☐ Working Groups ☐ E-Mail Files ☐

Discuss
Custom
Reports



Client Connect - Client: Document Management

Division [ ] All Projects ◯ Project [ ]

Project, City, State

Document A [e.g. Sale Agreement]
- Draft #1, dated _/_/_
- Draft #2, dated _/_/_
- Comments, dated _/_/_ [description: eg. Buyer's Comments]

Document B
- Draft #1, dated _/_/_
- Execution Form, dated _/_/_

Letters
Memos

☐ Storefront ☐ Working Group ☐ E-Mail Files ☐

· Clicking links to Document

· Secretarial Input

Consider Link to "Issues"

Purpose: Counsel Generated documents
Share, especially Redlined versions
Client can view/print

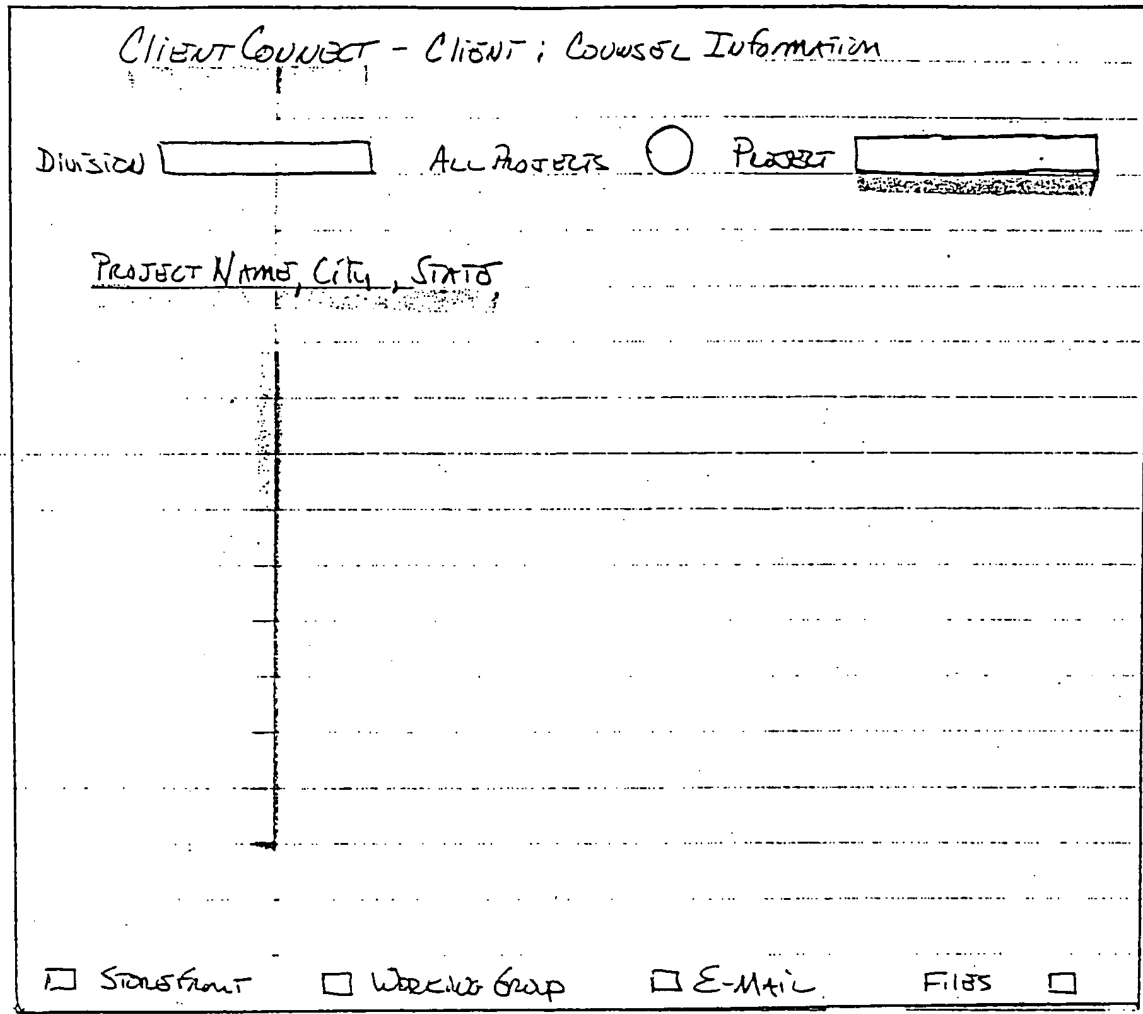
· Explore WP Highlighting tools

Consider:
Letters
Memos

Input: Counsel/Counsel staff

Links: to specific document

Relationship: Links only



Consider "Issues"

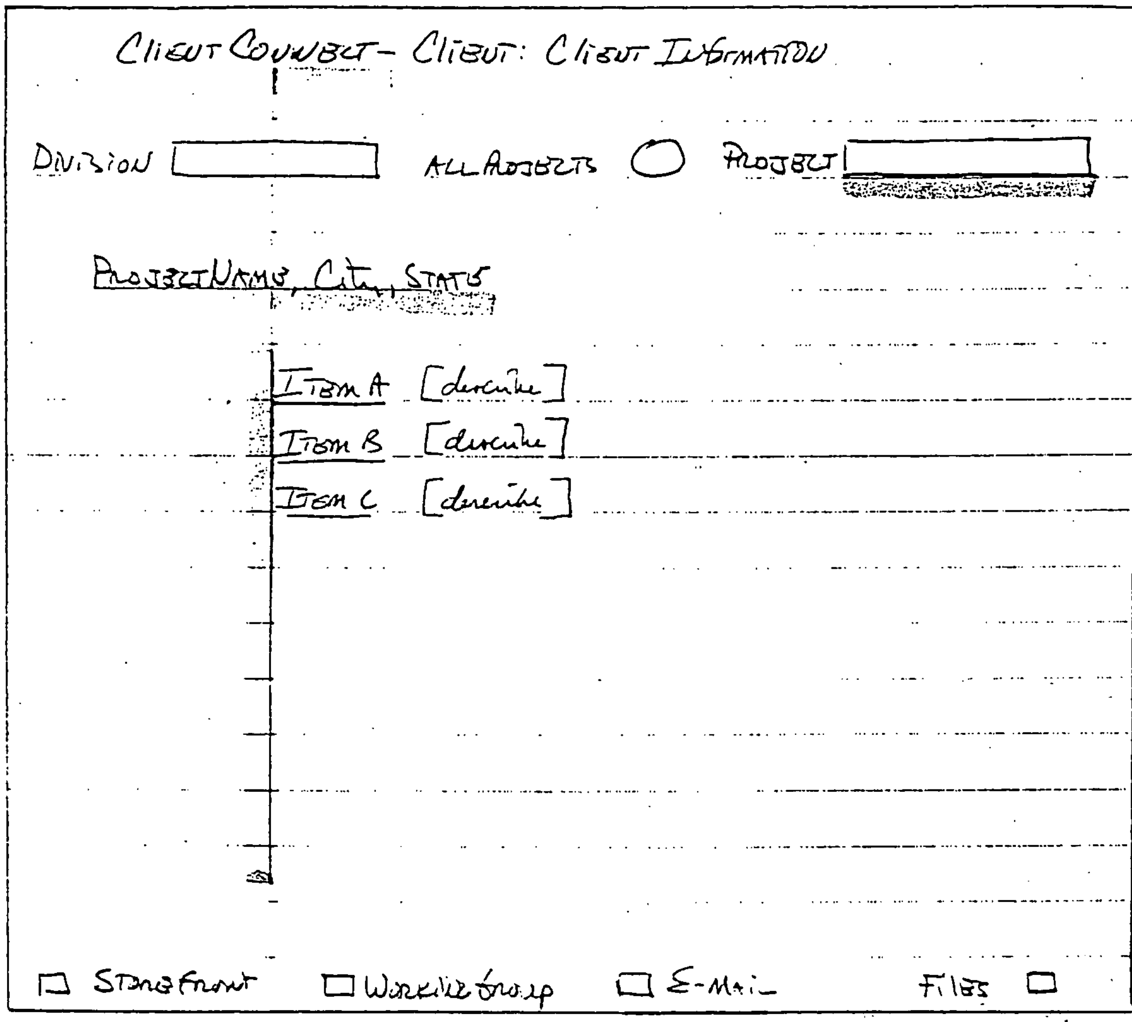
Purpose : Counsel generated info
highlight where applicable using Acrobat | Re;marks - 2 WAY
Share among working group

Candidates:
- Drafts / Markups
- Title Commitment
- Survey
- Title Policy
- Due Diligence Info

Input : Counsel / Counsel Staff

Links : to specific Item or document

Relationship : Links only



See – Consider "issues"

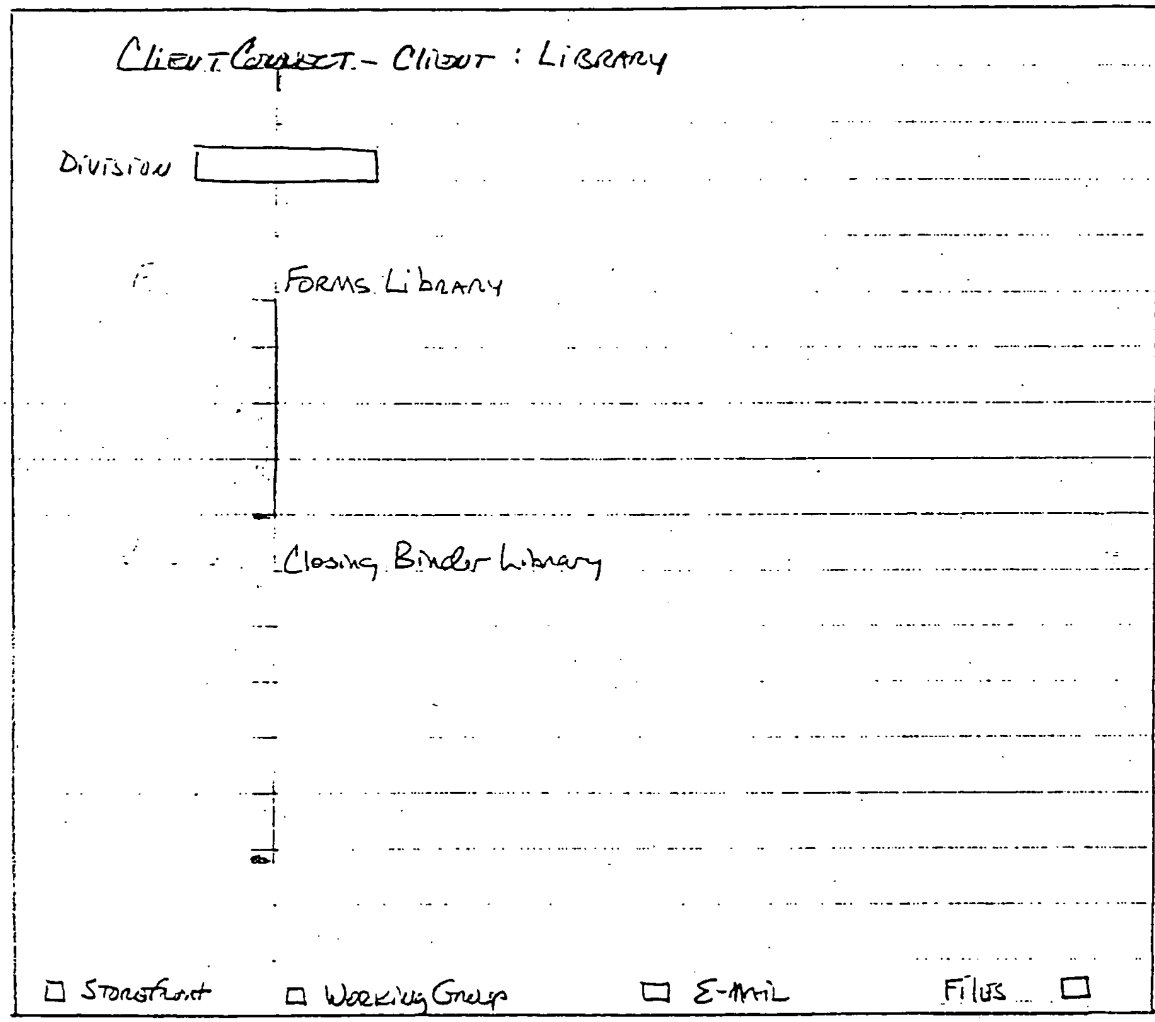
Purpose: Client Generated info
highlight where applicable using Acrobat/ReMark – 2 WAY
Share among working group

Candidates:
- Working Groups
- Client Checklists
- Other

Input: Client / Client Staff

Links: To specific Item or Document

Relationships: Links only



Key = Links to specific form / binder

For Use When Adding New Project for an Existing Client

NEW PROJECT WIZARD

Key: Must be Able to Update During Transaction

	Field Name	Data Input
• Provide Name of Project	Project	Type name
• Provide Name of Project, City and State	Project Name, City, and State	Type name of project, city and state
• Add any new "Responsibility" names for Client / Counsel	Responsibility	Type new names e.g., A - new HB - new
• Add any new "Discussion" names for Client / Counsel	Discuss	Type new names e.g., A - new HB - new
• Add any new "Approved" names for Client / Counsel	Approved	Type new names e.g., A - new HB - new
• Add any new "Action Parties" for Client / Counsel	Action Parties	Type new names e.g., A - new HB - new

- Working Group Additions: Complete WG form for each new Working Group member
- E-mail

Password aspects

DATA INPUT WIZARD

RP – can all [illegible] DATA BE
INPUTED IN SPECIFIC VIEW
eg: STATUS
Issues
Critical Dates
Checklists
Action
WORKING GROUPS

PASSWORD WIZARD

KEY = DEFINE PASSWORD ACCESS capabilities/limitations

NEW CLIENT WIZARD

	Field Name	Data Input
	Heading	Type name
• Does Client have different divisions that would use Client Connect? Select o Y o N		
• If Yes, then complete by listing divisions	Divisions	Type name(s) of divisions
[If No, then delete "Divisions" box]		
Will Client Connect be used for this new client for a Single ~~simple~~ project or multiple projects? Select o S o M		
[If "S", then delete "All Projects" box]		
- Complete name(s) of projects	Project	Type name(s) of projects

• Select applicable components

- o Transaction Management
  - o Status
  - o Issues
  - o Critical Dates
  - o Checklists
  - o Action
  - o Working Group
- o Document Management
- o Counsel Information
- o Client Information
- o Library

If selected "Transaction Management" components, then select applicable Transaction Management Reports

- Project Report
- Status Report
- Flag Report
- Issues Report
- Critical Dates Report
- Checklist Report
- Action Report
- Responsibility Report
- Discussion Report
- Custom Reports

- Passwords -- discuss with Melson☆

- Should "Issues" be broken down into 2 or more categories?

  Select ○ Y ○ N

  - If Yes, then list categories of "Issues"

- If Yes, then list categories of "Issues"	Issues Categories	Type issues categories (e.g., Input/ Initial Drafting Issues; Local Counsel Issues; Sale Agreement Issues)

- Select "Responsibility" parties can be multiple

  - Client
  - Counsel
  - Local counsel
  - Purchaser
  - Purchaser's Counsel
  - Seller
  - Seller's Counsel
  - Lessor
  - Lessor's Counsel
  - Lessee
  - Lessee's Counsel
  - Broker
  - Title Company
  - Escrow Agent
  - Lender
  - Borrower
  - Surveyor

• For "Client" and "Counsel"	Responsibility	For Client, type first letter or two of Client's name, then hyphen, then last name for each e.g., A -- Huff A -- Barger) For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each e.g., HB - Jenkins HB - Raines
• For "Discussion", please list persons within "Client" and "Counsel" to whom "Discussion" may be assigned	Discussion	For Client, type first letter or two of Client's name, then hyphen, then last name for each e.g., A - Huff A - Barger For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each e.g., HB - Jenkins HB - Raines
• For "Approved", please list persons within "Client" and "Counsel" to whom "Approved" may be assigned	Approved	For Client, type first letter or two of Client's name, then hyphen, then last name for each e.g., A - Huff A - Barger For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each e.g., HB - Jenkins HB - Raines

ADD Lit of Dates List

Checklists

Action

Working Group

To Do's

- Templates for Project
  - Issues Categories
  - Critical Dates
  - Checklists
- Wizards –
  - New Client
  - New Project
  - Passwords
  - Data Input